Employees List

Last Modified on 01/15/2026 10:28 am EST

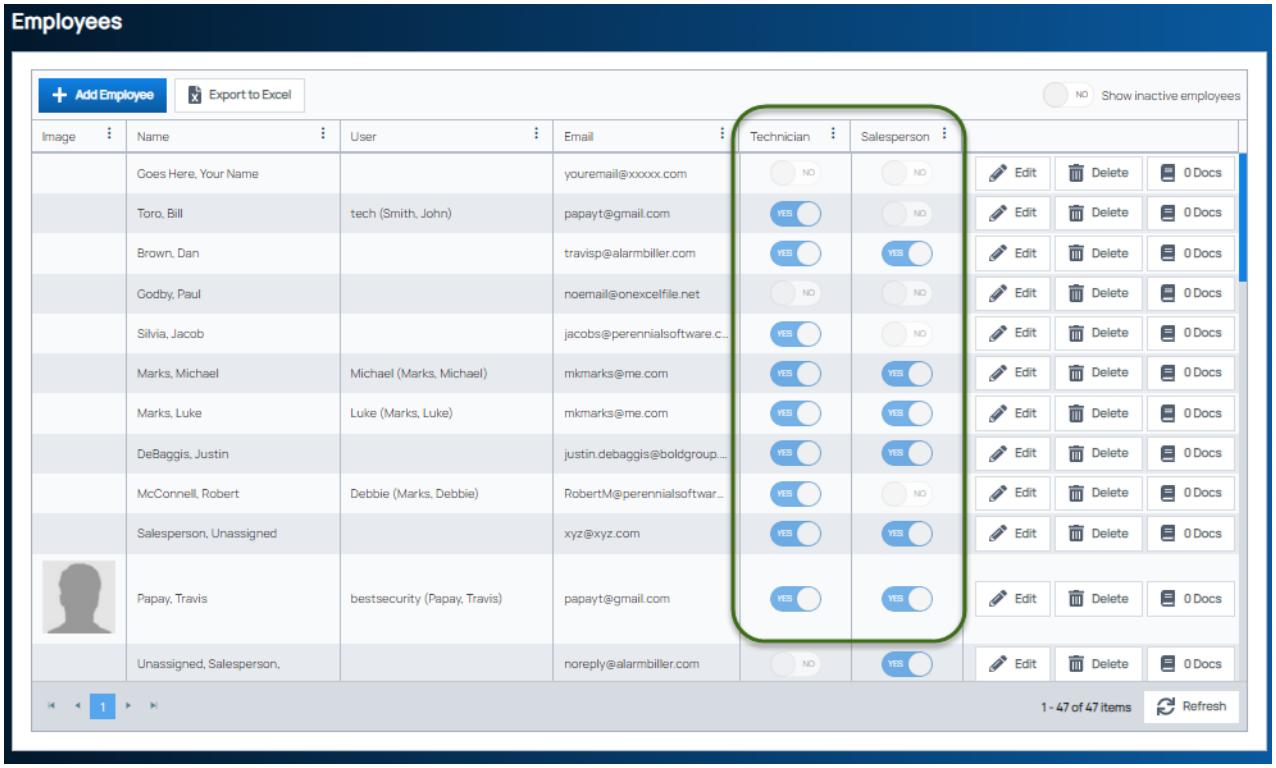
Employees are individuals who work for your company and may or may not be a person who will be using Managely.

If the employee is also a Managely user, you can link the employee to the saved user to auto-fill several of the data entry fields. An employee record contains fields to track additional information that is not available on the user record.

Accessing employees from the Company Setup menu shows a list of all active employees. If an employee has been marked as a Technician or Salesperson (or both) on their employee record, the Yes/No button in the Technician and Salesperson columns indicate this.

From the Employee List, you can perform the following actions:

- Add new employees
- Edit or delete existing employees



Employees List Tools

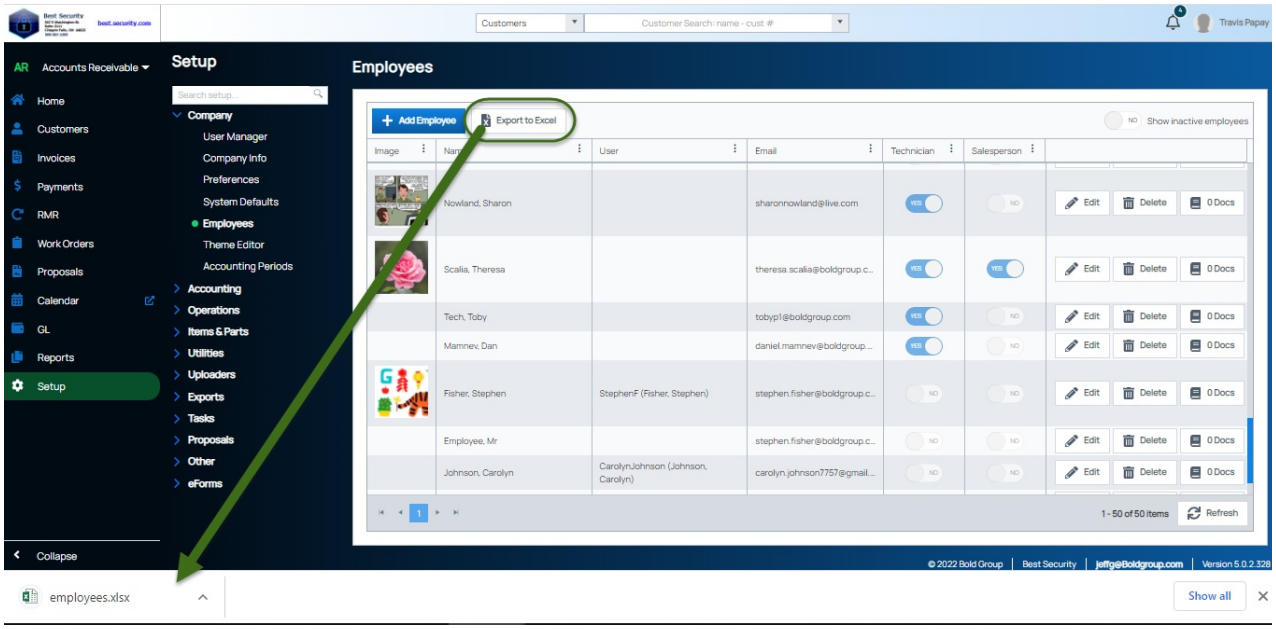
There are several tools available to manage the Employees List.

- Export to Excel
- Filter by active or inactive employees
- Open the menu (to the right of the column name) to hide/ show columns, or filter

Export to Excel

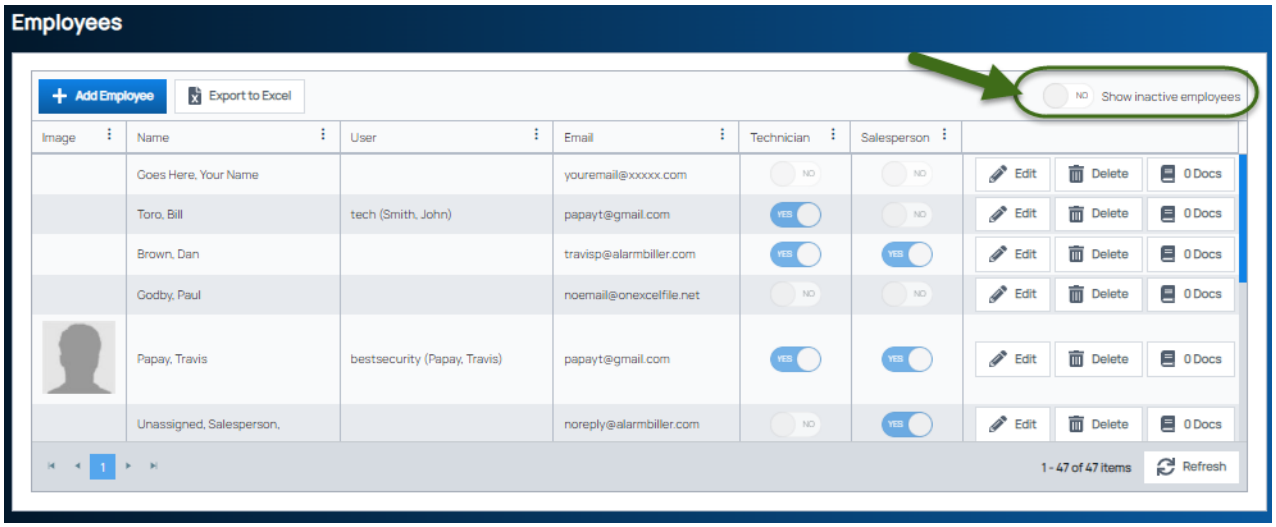
If you are viewing a list of all active or inactive records, clicking the Export to Excel button creates an Excel file with a

listing of the records currently shown in the grid. In a few seconds, the export file will appear on the taskbar. Double-click on the file to open.



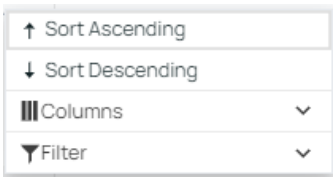
Filter by Active or Inactive

At the upper right of the list is a toggle button used to show active-only or Inactive-only records.



Column Options

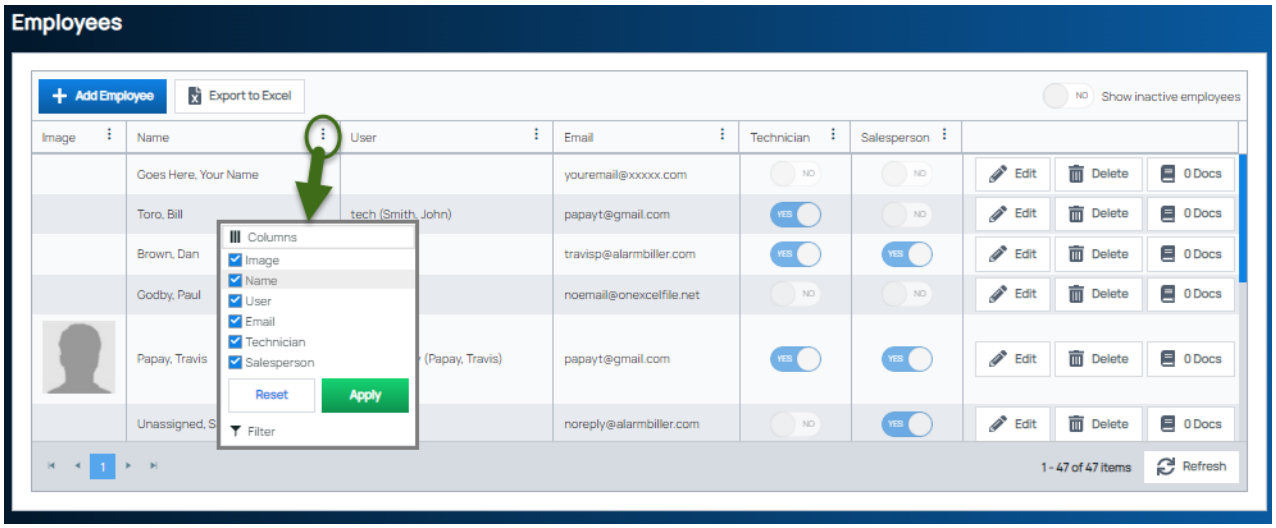
Clicking the kabob menu (three vertical dots) to the right of any column header displays a list of options:



Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the **Apply** button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.



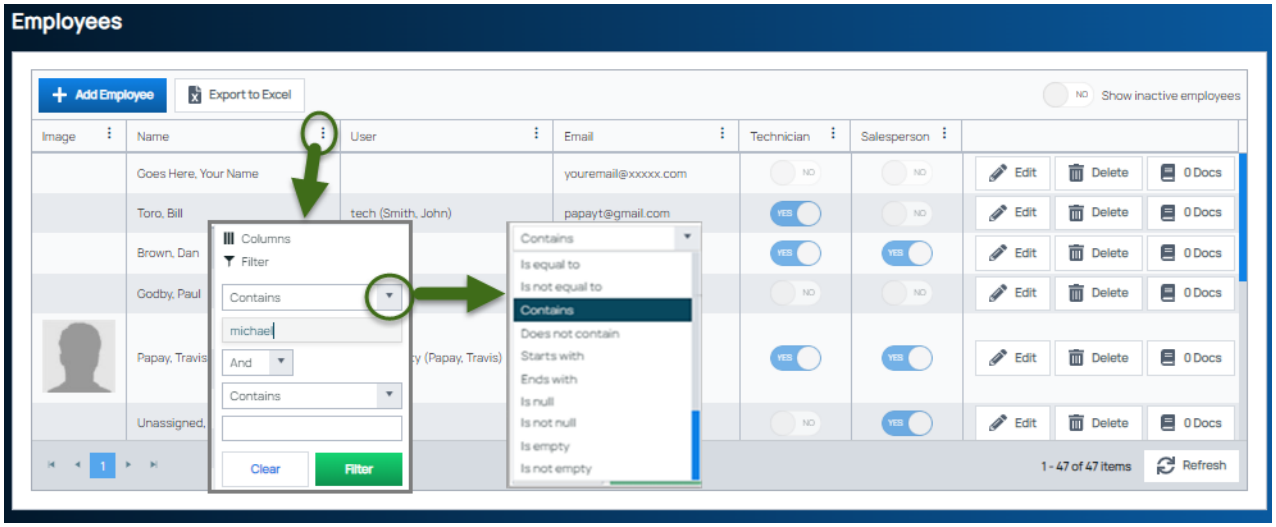
Filter

Use this option to refine the list displayed in the grid. When clicking on Filter, a dialog box is displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators are:

- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

Select the desired operator, and then enter the criteria in the field below. Click Filter when finished. The list refreshes based on the filter criteria entered.

Note: If you leave this page and then return again, the columns will revert to the default view.


Employees
Add Employee
Export to Excel
Show inactive employees
Image
Name
User
Email
Technician
Salesperson
Goes Here, Your Name
youremail@xxxxx.com
Toro, Bill
tech (Smith, John)
papayt@gmail.com
Brown, Dan
Godby, Paul
Papay, Travis
Unassigned,
Edit
Delete
0 Docs
Columns
Filter
Contains
michael
And
Contains
Clear
Filter
Is equal to
Is not equal to
Contains
Does not contain
Starts with
Ends with
Is null
Is not null
Is empty
Is not empty
1 - 47 of 47 items
Refresh